

# Envelope Designer

**File transfer problems.  
Solved.**



## Create custom file envelopes to capture meta-data and streamline business processes.

The Accellion Envelope Designer enables creation of custom file envelopes to capture and transfer meta-data associated with a file. With the Envelope Designer organizations can streamline business process by automating the transfer of files and associated meta-data in one simple operation.

Utilizing the award-winning Accellion Appliance as the secure file transfer engine the use of Accellion envelopes improves business efficiency, collaboration and data security.

### Benefits & Savings

#### Increases Business Efficiency

Digital businesses run on digital data generated on an hourly/daily basis around the globe. Meta-data capture, such as customer name, or record number, or due date, or a helpful comment, is typically necessary whenever a file is added to a business system. Including meta-data with file transfer via the Accellion Envelope Designer is an essential cost and time-saving tool for business.

With most corporations limiting file attachments to less than 10MB, Accellion provides a value-added secure file transport mechanism that frees up email bandwidth and storage.

#### Enhances Data Security for Compliance

Accellion is a key component in implementing the secure and auditable file transfer processes required for meeting IP security needs and compliance mandates such as Sarbanes-Oxley Section 404, 21 CFR Part 11, HIPAA, Department of Defense (DOD) 5015.2, and Securities and Exchange (SEC) Act Rules 17a-3 4 (17 CFR 240,17a-3,4).

Using Accellion throughout an organization creates an audit trail of all enterprise file transfers. Meta data captured within the Accellion Envelope is also transferred with the same encryption and business-level security features delivered with Accellion secure file transfer.

#### Improves Collaboration

In today's business, collaboration requires the exchange of digital information. Accellion simplifies the transfer of files and folders of any size – including gigabyte-sized – to recipients at any location and organization.

The Accellion Envelope Designer takes full advantage of Accellion's unique approach to file transfer that uses email as a message bus but

### KEY BENEFITS

- Streamlines business processes
- Increases business efficiency
- Enhances data security for compliance
- Improves collaboration
- Captures and transfers meta-data associated with a file
- Delivers significant cost and time savings

not as a file transport vehicle. Using the Envelope Designer organizations can customize the traditional email send form to create customized forms tailored to their workflow and collaboration needs to capture and transfer required data associated with a file.

### Custom Capture Fields

The Envelope Designer supports the creation of a wide variety of meta-data capture fields that cover a wide range of needs including:

- Textbox
- Pick List
- Checkbox
- Radio Button
- Calendar

In addition the Envelope Designer allows for creation of static fields not editable by the user.

#### Usage Example – improve response time

Custom Envelope captures client name and project due date in custom fields to prioritize incoming project requests.

### Custom Envelope Layouts

The Envelope Designer allows for flexible design layout of custom meta-data capture fields. Custom fields can be arranged at various positions within the forms.

Custom fields can be indicated as optional or mandatory. In addition static text can be included on the form layout to provide additional instructions/messages to the user.

#### Usage Example–track physical Assets

Custom Envelope captures Originator and Consignee Contact Information, Date of Transfer, Work Order Number and Product ID in custom fields along with related asset files.

## User Specific Envelopes

A valuable feature of the Envelope Designer is the ability to configure custom designed envelope for use by specific user profiles. By creating custom envelopes designed for specific user groups organizations are able to greatly streamline business processes.

In addition custom envelopes can be directly accessed by authorized users. e.g. [fta.domain.com/envelope/RFQ](http://fta.domain.com/envelope/RFQ) gives direct access to a custom envelope for sending RFP responses.

### Usage Examples—Manage Digital Assets

Custom Envelope captures RFP document Author, Submittal Date, and specified Products in custom fields for entry into an RFP Submittal database.

## Meta-Data Delivery Options

Meta-data captured within an Accellion Envelope is delivered along with the file. Optionally the meta-data in custom fields can be included in the email body.

Meta-Data in custom envelopes can also be downloaded in CVS format from Send Activity Report.

### Usage Example—automate product tests

Custom Envelope captures product id and product test date in custom fields along with incoming digital product performance charts for input into product modeling software.

### KEY BENEFITS

- Create Custom File Envelopes
- Create Custom Meta-data Fields
- Create Custom Envelope Layouts
- Create User Specific Envelopes
- Enable Meta-Data Delivery Options